

Oil and Gas Security and Service Market by Component (Solution and Services), Services, Security Type (Physical Security and Network Security), Operation (Upstream, Midstream, and Downstream), and Region - Global Forecast to 2025

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Abstracts

“Increased expenditure by oil and gas companies on network and physical security expected to drive the growth of the oil and gas security and service market”

The global oil and gas security and service market size is expected to grow from an estimated value offrom USD 25.3 billion in 2020 to USD 32.5 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 5.2% during the forecast period. The oil and gas security and service industry is driven by various factors, such as growing political instability in Middle East and need to ensure compliance with industry regulations in oil and gas security and service market.However, high reliance on existing security solutions can hinder the growth of the market.

The recent COVID-19 pandemic is expected to impact the oil and gas security and service industry. The pandemic and subsequent response is already exerting pressure on governments, economies, households, and different industries across world. The oil and gas industry, both on shore and offshore, are mostly affected by Stuxnet and Exxon’s Torrance. Fluctuation in oil prices and political instability in the MEA and APAC region have set the stage for cyber disasters in the oil and gas industry.

Service segment to grow at a higher CAGR during the forecast period

According to the deputy director of GCHQ, Brian Lord, the oil and gas industry is the second most susceptible sector to cyber-attacks. The upstream, midstream, and

downstream sectors are highly digitalized, which makes them more prone to cyber-attacks. Companies are focusing more on security services to prevent such attacks. Viruses and malware are evolving daily due to which it becomes very difficult for old systems and security patches to identify threats. Consequently, organizations are updating security patches and software to secure themselves from cyber-attacks. Due to the outbreak of COVID-19, companies such as NTT Security is started offering managed services to help oil and gas companies to manage their all aspects of cybersecurity. Increase in the number of connected devices, which raises the number of endpoints, has increased cyber issues recently. Moreover, lack of awareness about oil and gas security solutions and services, difficulty in the implementation of the IT technologies, and vulnerabilities associated with the cloud have also affected the oil and gas industry, which provides growth opportunities to service providers.

Solution segment to account for a higher market share during the forecast period

Oil and gas companies, which form the backbone of many regions, are facing unprecedented challenges due to various reasons, ranging from geopolitical issues to the obstacles created by the current pandemic. Onshore wells, offshore platforms, and oil and gas pipelines constitute the key assets of energy companies, and ensuring the cybersecurity of these assets is critical for companies. To comply with regulations, upkeep asset performance, and utilize business resources optimally, oil and gas companies are switching to cloud technologies. Migration to the cloud makes organizations more vulnerable to cyber-attacks, which call for proper security measures. The increasing number of mobile devices, including personal and those used by field personnel, in utility companies' corporate networks has raised the chances of cyber-attacks. Consequently, the demand for security solutions has catapulted remarkably.

Middle East and Africa to grow at the highest rate during the forecast period

The oil and gas security and service market in Middle East and Africa is expected to grow at the highest CAGR during the forecast period. The rise of various terrorist groups and militias and vacuum created due to the ineffective governments in the Middle Eastern and northern African countries is propelling the need for oil and gas security solutions. In the North America, there is a tremendous demand for oil and gas security and service.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the oil and gas security and service market.

By company type: Tier 1:38%, Tier 2:42%, and Tier 3: 20%

By designation: C-level:32%, Directors:36%, and Others: 32%

By region: North America: 35%, Europe: 27%, APAC:23%, MEA: 10%, Latin America: 5%

Major vendors offering oil and gas security and service solution across the globe are Cisco (US), NortonLifeLock (US), Honeywell (US), Siemens (Germany), Microsoft (US), Lockheed Martin (US), ABB (Switzerland), Parsons (US), Fortinet (US), Trend Micro (Japan), Forescout (US), GE (US), Synectics (UK), Intel (US), Speedcast (Australia), Booz Allen (US), Thales (France), HCL (India), IBM (US), BAE Systems (UK), Sophos (UK), Xage Security (US), Waterfall Security Solutions (Israel), Nozomi Networks (US), CNL Software (UK), Moxa (Taiwan), GPS Security (Canada), Athos (US), TSN (US), and J&G Security (US). The study includes an in-depth competitive analysis of the key players in the oil and gas security and service market, with their company profiles, recent developments, and key market strategies.

Research coverage

The market study covers the oil and gas security and service market size across segments. It aims at estimating the market size and growth potential of this market across different segments: component, services, security type, operation and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key benefits of buying the report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall oil and gas security and service market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 INTRODUCTION TO COVID-19

1.2 COVID-19 HEALTH ASSESSMENT

FIGURE 1 COVID-19: GLOBAL PROPAGATION

FIGURE 2 COVID-19 PROPAGATION: SELECT COUNTRIES

1.3 COVID-19 ECONOMIC ASSESSMENT

FIGURE 3 REVISED GROSS DOMESTIC PRODUCT FORECASTS FOR SELECT G20 COUNTRIES IN 2020

1.3.1 COVID-19 ECONOMIC IMPACT—SCENARIO ASSESSMENT

FIGURE 4 CRITERIA IMPACTING GLOBAL ECONOMY

FIGURE 5 SCENARIOS IN TERMS OF RECOVERY OF GLOBAL ECONOMY

1.4 STUDY OBJECTIVES

1.5 MARKET DEFINITION

1.5.1 INCLUSIONS AND EXCLUSIONS

1.6 MARKET SCOPE

1.6.1 MARKET SEGMENTATION

FIGURE 6 OIL AND GAS SECURITY AND SERVICE MARKET: MARKET SEGMENTATION

FIGURE 7 OIL AND GAS SECURITY AND SERVICE MARKET: REGIONS COVERED

1.6.2 YEARS CONSIDERED

1.7 CURRENCY

TABLE 1 UNITED STATES DOLLAR EXCHANGE RATE, 2014–2019

1.8 STAKEHOLDERS

1.9 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 8 OIL AND GAS SECURITY AND SERVICE MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.2 PRIMARY DATA

2.1.2.1 Breakup of primary profiles

2.1.2.2 Key industry insights

2.2 MARKET BREAKUP AND DATA TRIANGULATION

2.3 MARKET SIZE ESTIMATION

FIGURE 9 OIL AND GAS SECURITY AND SERVICE MARKET: TOP-DOWN AND

BOTTOM-UP APPROACHES

2.3.1 TOP-DOWN APPROACH

2.3.2 BOTTOM-UP APPROACH

FIGURE 10 OIL AND GAS SECURITY AND SERVICE MARKET: RESEARCH METHODOLOGY

FIGURE 11 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP (SUPPLY SIDE): ILLUSTRATIVE EXAMPLE OF PARSONS

2.4 MARKET FORECAST

TABLE 2 FACTOR ANALYSIS

2.5 ASSUMPTIONS

2.6 LIMITATIONS

3 EXECUTIVE SUMMARY

3.1 MARKET ESTIMATES AND FORECASTS, 2014–2025

TABLE 3 GLOBAL OIL AND GAS SECURITY AND SERVICE MARKET, 2014–2019 (USD MILLION)

TABLE 4 POST- COVID-19: GLOBAL OIL AND GAS SECURITY AND SERVICE MARKET, 2019–2025 (USD MILLION)

FIGURE 12 GLOBAL OIL AND GAS SECURITY AND SERVICE MARKET, 2018–2025

FIGURE 13 SEGMENTS WITH HIGH MARKET SHARES IN OIL AND GAS SECURITY AND SERVICE MARKET IN 2020

FIGURE 14 NORTH AMERICA TO ACCOUNT FOR HIGHEST MARKET SHARE IN 2020

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN OIL AND GAS SECURITY AND SERVICE MARKET

FIGURE 15 GROWING NUMBER OF CYBER AND TERRORIST ATTACKS TO BOOST ADOPTION OF SECURITY SOLUTION AMONG OIL AND GAS PROVIDERS

4.2 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET, BY COMPONENT

AND COUNTRY, 2020

FIGURE 16 SOLUTION SEGMENT AND UNITED STATES TO ACCOUNT FOR HIGHER MARKET SHARES IN 2020

4.3 OIL AND GAS SECURITY AND SERVICE MARKET, BY COMPONENT, 2020–2025

FIGURE 17 SERVICES TO GROW AT A HIGHER GROWTH RATE DURING

FORECAST PERIOD

4.4 OIL AND GAS SECURITY AND SERVICE MARKET, BY OPERATION, 2020–2025

FIGURE 18 MIDSTREAM SEGMENT TO GROW AT HIGHEST RATE DURING FORECAST PERIOD

5 MARKET OVERVIEW AND INDUSTRY TRENDS

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Increased expenditure by oil and gas companies on network and physical security

5.2.1.2 Growing political instability in Middle East

5.2.1.3 Need to ensure compliance with industry regulations

5.2.2 RESTRAINT

5.2.2.1 High reliance on existing security solutions

5.2.3 OPPORTUNITY

5.2.3.1 Adoption of cloud technologies in oil and gas industry

5.2.3.2 Rise in adoption of Internet of Things (IoT)

5.2.4 CHALLENGES

5.2.4.1 Lack of awareness and security training within oil and gas industry

5.2.4.2 Difficulty in implementation of comprehensive security solutions in multisite facilities

5.3 COVID-19 PANDEMIC-DRIVEN MARKET DYNAMICS

5.3.1 DRIVERS AND OPPORTUNITIES

5.3.2 RESTRAINTS AND CHALLENGES

5.3.3 CUMULATIVE GROWTH ANALYSIS

TABLE 5 COVID-19 IMPACT: OIL AND GAS SECURITY AND SERVICE MARKET, USD BILLION

5.4 USE CASES

5.4.1 KAZTRANSOIL DEPLOYED ERPSCAN FOR ITS SAP SYSTEM TO PREVENT CYBER ATTACKS AND KEEP CRITICAL INFRASTRUCTURE MORE SECURED

5.4.2 A LEADING OIL AND GAS COMPANY IN US ENHANCED ITS INDUSTRIAL CYBERSECURITY WITH HELP OF MOXA

5.4.3 GLOBAL OFFSHORE OIL AND GAS COMPANY DEPLOYED SOLUTIONS PROVIDED BY WATERFALL SECURITY SOLUTIONS TO PROTECT OFFSHORE EXPLORATION AND PRODUCTION FROM EVOLVING CYBER THREATS

5.5 VALUE CHAIN ANALYSIS

5.5.1 OIL AND GAS SECURITY AND SERVICE MARKET: VALUE CHAIN ANALYSIS

FIGURE 19 VALUE CHAIN ANALYSIS**5.6 ECOSYSTEM****5.7 TECHNOLOGY ANALYSIS****5.7.1 ARTIFICIAL INTELLIGENCE AND PREDICTIVE ANALYTICS****5.7.2 CLOUD AND MOBILITY****5.8 PRICING ANALYSIS****TABLE 6 CISCO KINETIC PLATFORM****TABLE 7 NORTON LIFELOCK****5.9 REGULATORY LANDSCAPE****5.9.1 ISO 29001 FOR OIL AND GAS****5.9.2 FEDERAL ENERGY REGULATORY COMMISSION****5.9.3 SARBANES-OXLEY ACT****5.10 ADJACENT MARKETS****TABLE 8 ADJACENT MARKETS OF OIL AND GAS SECURITY AND SERVICE MARKET****6 OIL AND GAS SECURITY AND SERVICE MARKET, BY COMPONENT****6.1 INTRODUCTION****6.1.1 COMPONENT: COVID-19 IMPACT****FIGURE 20 SERVICES SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD****6.1.2 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025****TABLE 9 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)****TABLE 10 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)****6.2 SOLUTION****6.2.1 SOLUTION: MARKET DRIVERS****6.2.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025****TABLE 11 SOLUTION: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)****TABLE 12 SOLUTION: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)****6.2.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025****TABLE 13 NORTH AMERICA: SOLUTION MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)****TABLE 14 NORTH AMERICA: SOLUTION MARKET SIZE, BY COUNTRY, 2019–2025**

(USD MILLION)

6.2.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY,
2014–2025

TABLE 15 EUROPE: SOLUTION MARKET SIZE, BY COUNTRY, 2014–2019 (USD
MILLION)

TABLE 16 EUROPE: SOLUTION MARKET SIZE, BY COUNTRY, 2019–2025 (USD
MILLION)

6.2.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 17 APAC: SOLUTION MARKET SIZE, BY COUNTRY, 2014–2019 (USD
MILLION)

TABLE 18 APAC: SOLUTION MARKET SIZE, BY COUNTRY, 2019–2025 (USD
MILLION)

6.2.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 19 MEA: SOLUTION MARKET SIZE, BY COUNTRY, 2014–2019 (USD
MILLION)

TABLE 20 MEA: SOLUTION MARKET SIZE, BY COUNTRY, 2019–2025 (USD
MILLION)

6.3 SERVICES

6.3.1 SERVICES: MARKET DRIVERS

6.3.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 21 SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY
REGION, 2014–2019 (USD MILLION)

TABLE 22 SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY
REGION, 2019–2025 (USD MILLION)

6.3.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY,
2014–2025

TABLE 23 NORTH AMERICA: SERVICES MARKET SIZE, BY COUNTRY, 2014–2019
(USD MILLION)

TABLE 24 NORTH AMERICA: SERVICES MARKET SIZE, BY COUNTRY, 2019–2025
(USD MILLION)

6.3.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY,
2014–2025

TABLE 25 EUROPE: SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD
MILLION)

TABLE 26 EUROPE: SERVICES MARKET SIZE, BY COUNTRY, 2019–2025 (USD
MILLION)

6.3.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 27 APAC: SERVICES MARKET SIZE, BY COUNTRY, 2014–2019 (USD
MILLION)

TABLE 28 APAC: SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

6.3.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 29 MEA: SERVICES MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 30 MEA: SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7 OIL AND GAS SECURITY AND SERVICE MARKET, BY SERVICE

7.1 INTRODUCTION

7.1.1 SERVICES: COVID-19 IMPACT

FIGURE 21 RISK MANAGEMENT SERVICES SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

7.1.2 MARKET ESTIMATES AND FORECASTS, BY SERVICES, 2014–2025

TABLE 31 SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY TYPE, 2014–2019 (USD MILLION)

TABLE 32 SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY TYPE, 2019–2025 (USD MILLION)

7.2 RISK MANAGEMENT SERVICES

7.2.1 RISK MANAGEMENT SERVICES: MARKET DRIVERS

7.2.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 33 RISK MANAGEMENT SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 34 RISK MANAGEMENT SERVICES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

7.2.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 35 NORTH AMERICA: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 36 NORTH AMERICA: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.2.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 37 EUROPE: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 38 EUROPE: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.2.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 39 APAC: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY,

2014–2019 (USD MILLION)

TABLE 40 APAC: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.2.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 41 MEA: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 42 MEA: RISK MANAGEMENT SERVICES MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.3 SYSTEM DESIGN, INTEGRATION, AND CONSULTING

7.3.1 SYSTEM DESIGN, INTEGRATION, AND CONSULTING: MARKET DRIVERS

7.3.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 43 SYSTEM DESIGN, INTEGRATION, AND CONSULTING: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 44 SYSTEM DESIGN, INTEGRATION, AND CONSULTING: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

7.3.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 45 NORTH AMERICA: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 46 NORTH AMERICA: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.3.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 47 EUROPE: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 48 EUROPE: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.3.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 49 APAC: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 50 APAC: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.3.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 51 MEA: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 52 MEA: SYSTEM DESIGN, INTEGRATION, AND CONSULTING MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

7.4 MANAGED SERVICES

7.4.1 MANAGED SERVICES: MARKET DRIVERS

7.4.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014-2025

TABLE 53 MANAGED SERVICES: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 54 MANAGED SERVICES: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

7.4.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 55 NORTH AMERICA: MANAGED SERVICES MARKET SIZE, BY COUNTRY,
2014–2019 (USD MILLION)

TABLE 56 NORTH AMERICA: MANAGED SERVICES MARKET SIZE, BY COUNTRY,
2019–2025 (USD MILLION)

7.4.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 57 EUROPE: MANAGED SERVICES MARKET SIZE, BY COUNTRY,
2014–2019 (USD MILLION)

TABLE 58 EUROPE: MANAGED SERVICES MARKET SIZE, BY COUNTRY,
2019–2025 (USD MILLION)

7.4.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 59 APAC: MANAGED SERVICES MARKET SIZE, BY COUNTRY, 2014–2019
(USD MILLION)

TABLE 60 APAC: MANAGED SERVICES MARKET SIZE, BY COUNTRY, 2019–2025
(USD MILLION)

7.4.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 61 MEA: MANAGED SERVICES MARKET SIZE, BY COUNTRY, 2014–2019
(USD MILLION)

TABLE 62 MEA: MANAGED SERVICES MARKET SIZE, BY COUNTRY, 2019–2025
(USD MILLION)

8 OIL AND GAS SECURITY AND SERVICE MARKET, BY SECURITY TYPE

8.1 INTRODUCTION

8.1.1 SECURITY TYPE: COVID-19 IMPACT

8.1.2 BY SECURITY TYPE: OIL AND GAS SECURITY AND SERVICE MARKET DRIVERS

FIGURE 22 NETWORK SECURITY SEGMENT TO GROW AT HIGHER CAGR
DURING FORECAST PERIOD

8.1.3 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025

TABLE 63 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY
TYPE, 2014–2019 (USD MILLION)

TABLE 64 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

8.2 PHYSICAL SECURITY

8.2.1 PHYSICAL SECURITY: MARKET DRIVERS

8.2.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 65 PHYSICAL SECURITY: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 66 PHYSICAL SECURITY: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

8.2.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 67 NORTH AMERICA: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 68 NORTH AMERICA: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

8.2.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 69 EUROPE: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 70 EUROPE: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

8.2.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 71 APAC: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 72 APAC: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

8.2.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 73 MEA: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 74 MEA: PHYSICAL SECURITY MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

8.2.7 BIOMETRICS AND ACCESS CONTROLS

8.2.8 VIDEO SURVEILLANCE

8.2.9 GROUND, COASTAL, AND AIR SURVEILLANCE

8.2.10 PERSONNEL TRACKING AND RADIO FREQUENCY IDENTIFICATION (RFID)

8.2.11 OVER AND UNDERWATER SURVEILLANCE

8.2.12 SECURE COMMUNICATION

8.2.13 LONG RANGE RADAR

8.2.14 SCREENING AND SCANNING

8.2.15 BUILDING MANAGEMENT SYSTEM

8.2.16 FIRE DETECTION AND SECURITY SYSTEM

8.2.17 PERIMETER FENCING

8.2.18 CBRNE/HAZMAT

8.3 NETWORK SECURITY

8.3.1 NETWORK SECURITY: MARKET DRIVERS

8.3.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 75 NETWORK SECURITY: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 76 NETWORK SECURITY: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

8.3.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY,
2014–2025

TABLE 77 NORTH AMERICA: NETWORK SECURITY MARKET SIZE, BY COUNTRY,
2014–2019 (USD MILLION)

TABLE 78 NORTH AMERICA: NETWORK SECURITY MARKET SIZE, BY COUNTRY,
2019–2025 (USD MILLION)

8.3.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY,
2014–2025

TABLE 79 EUROPE: NETWORK SECURITY MARKET SIZE, BY COUNTRY,
2014–2019 (USD MILLION)

TABLE 80 EUROPE: NETWORK SECURITY MARKET SIZE, BY COUNTRY,
2019–2025 (USD MILLION)

8.3.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 81 APAC: NETWORK SECURITY MARKET SIZE, BY COUNTRY, 2014–2019
(USD MILLION)

TABLE 82 APAC: NETWORK SECURITY MARKET SIZE, BY COUNTRY, 2019–2025
(USD MILLION)

8.3.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 83 MEA: NETWORK SECURITY MARKET SIZE, BY COUNTRY, 2014–2019
(USD MILLION)

TABLE 84 MEA: NETWORK SECURITY MARKET SIZE, BY COUNTRY, 2019–2025
(USD MILLION)

8.3.7 IDENTITY AND ACCESS MANAGEMENT (IAM)

8.3.8 FIREWALLS

8.3.9 UPDATE AND PATCH MANAGEMENT

8.3.10 SECURITY INFORMATION AND EVENT MANAGEMENT (SIEM)

8.3.11 INCIDENT RESPONSE AND DISASTER RECOVERY

8.3.12 SUPERVISORY CONTROL AND DATA ACQUISITION (SCADA)

8.3.13 UNIFIED THREAT MANAGEMENT (UTM)

9 OIL AND GAS SECURITY AND SERVICE MARKET, BY OPERATION

9.1 INTRODUCTION

9.1.1 OPERATION: COVID-19 IMPACT

FIGURE 23 MIDSTREAM SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

9.1.2 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025

TABLE 85 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 86 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

9.2 UPSTREAM

9.2.1 UPSTREAM: MARKET DRIVERS

9.2.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 87 UPSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 88 UPSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

9.2.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 89 NORTH AMERICA: UPSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 90 NORTH AMERICA: UPSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.2.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 91 EUROPE: UPSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 92 EUROPE: UPSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.2.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 93 APAC: UPSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 94 APAC: UPSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.2.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 95 MEA: UPSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 96 MEA: UPSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.3 MIDSTREAM

9.3.1 MIDSTREAM: MARKET DRIVERS

9.3.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 97 MIDSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 98 MIDSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

9.3.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 99 NORTH AMERICA: MIDSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 100 NORTH AMERICA: MIDSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.3.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 101 EUROPE: MIDSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 102 EUROPE: MIDSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.3.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 103 APAC: MIDSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 104 APAC: MIDSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.3.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 105 MEA: MIDSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 106 MEA: MIDSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.4 DOWNSTREAM

9.4.1 DOWNSTREAM: MARKET DRIVERS

9.4.2 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 107 DOWNSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 108 DOWNSTREAM: OIL AND GAS SECURITY AND SERVICE MARKET

SIZE, BY REGION, 2019–2025 (USD MILLION)

9.4.3 MARKET ESTIMATES AND FORECASTS, BY NORTH AMERICAN COUNTRY, 2014–2025

TABLE 109 NORTH AMERICA: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 110 NORTH AMERICA: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.4.4 MARKET ESTIMATES AND FORECASTS, BY EUROPEAN COUNTRY, 2014–2025

TABLE 111 EUROPE: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 112 EUROPE: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.4.5 MARKET ESTIMATES AND FORECASTS, BY APAC COUNTRY, 2014–2025

TABLE 113 APAC: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 114 APAC: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

9.4.6 MARKET ESTIMATES AND FORECASTS, BY MEA COUNTRY, 2014–2025

TABLE 115 MEA: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 116 MEA: DOWNSTREAM MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

10 OIL AND GAS SECURITY AND SERVICE MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 24 MEA TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

10.1.1 MARKET ESTIMATES AND FORECASTS, BY REGION, 2014–2025

TABLE 117 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2014–2019 (USD MILLION)

TABLE 118 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY REGION, 2019–2025 (USD MILLION)

10.2 NORTH AMERICA

10.2.1 NORTH AMERICA: MARKET DRIVERS

10.2.2 NORTH AMERICA: COVID-19 IMPACT

10.2.3 NORTH AMERICA: REGULATIONS

10.2.3.1 Federal energy regulatory commission (FERC)

FIGURE 25 NORTH AMERICA: MARKET SNAPSHOT

10.2.4 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025

TABLE 119 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 120 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.2.5 MARKET ESTIMATES AND FORECASTS, BY SERVICE, 2014–2025

TABLE 121 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 122 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.2.6 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025

TABLE 123 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 124 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.2.7 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025

TABLE 125 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 126 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.2.8 MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025

TABLE 127 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 128 NORTH AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

10.2.9 UNITED STATES

10.2.9.1 Market estimates and forecasts, by component, 2014-2025

TABLE 129 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 130 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.2.9.2 Market estimates and forecasts, by service, 2014-2025

TABLE 131 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 132 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.2.9.3 Market estimates and forecasts, by security type, 2014-2025

TABLE 133 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 134 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.2.9.4 Market estimates and forecasts, by operation, 2014-2025

TABLE 135 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 136 UNITED STATES: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.2.10 CANADA

10.2.10.1 Market estimates and forecasts, by component, 2014-2025

TABLE 137 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 138 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.2.10.2 Market estimates and forecasts, by service, 2014-2025

TABLE 139 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 140 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.2.10.3 Market estimates and forecasts, by security type, 2014-2025

TABLE 141 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 142 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.2.10.4 Market estimates and forecasts, by operation, 2014-2025

TABLE 143 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 144 CANADA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.3 EUROPE

10.3.1 EUROPE: COVID-19 IMPACT

10.3.2 EUROPE: MARKET DRIVERS

10.3.3 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025

TABLE 145 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 146 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.3.4 MARKET ESTIMATES AND FORECASTS, BY SERVICE, 2014–2025

TABLE 147 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 148 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.3.5 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025

TABLE 149 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 150 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.3.6 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025

TABLE 151 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 152 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.3.7 MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025

TABLE 153 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 154 EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

10.3.8 UNITED KINGDOM

10.3.8.1 Market estimates and forecasts, by component, 2014–2025

TABLE 155 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 156 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.3.8.2 Market estimates and forecasts, by service, 2014–2025

TABLE 157 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 158 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.3.8.3 Market estimates and forecasts, by security type, 2014–2025

TABLE 159 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 160 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.3.8.4 Market estimates and forecasts, by operation, 2014–2025

TABLE 161 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 162 UNITED KINGDOM: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.3.9 RUSSIA

10.3.9.1 Market estimates and forecasts, by component, 2014-2025

TABLE 163 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 164 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.3.9.2 Market estimates and forecasts, by service, 2014-2025

TABLE 165 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 166 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE TYPE, 2019–2025 (USD MILLION)

10.3.9.3 Market estimates and forecasts, by security type, 2014-2025

TABLE 167 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 168 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.3.9.4 Market estimates and forecasts, by operation, 2014-2025

TABLE 169 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 170 RUSSIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.3.10 REST OF EUROPE

10.3.10.1 Market estimates and forecasts, by component, 2014-2025

TABLE 171 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 172 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.3.10.2 Market estimates and forecasts, by service, 2014-2025

TABLE 173 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 174 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.3.10.3 Market estimates and forecasts, by security type, 2014-2025

TABLE 175 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 176 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.3.10.4 Market estimates and forecasts, by operation, 2014-2025

TABLE 177 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 178 REST OF EUROPE: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.4 ASIA PACIFIC

10.4.1 ASIA PACIFIC: COVID-19 IMPACT

10.4.2 ASIA PACIFIC: MARKET DRIVERS

FIGURE 26 ASIA PACIFIC: MARKET SNAPSHOT

10.4.3 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025

TABLE 179 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 180 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.4.4 MARKET ESTIMATES AND FORECASTS, BY SERVICE, 2014–2025

TABLE 181 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 182 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.4.5 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025

TABLE 183 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 184 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.4.6 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025

TABLE 185 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 186 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.4.7 MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025

TABLE 187 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 188 ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

10.4.8 CHINA

10.4.8.1 Market estimates and forecasts, by component, 2014–2025

TABLE 189 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 190 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.4.8.2 Market estimates and forecasts, by service, 2014–2025

TABLE 191 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY

SERVICE, 2014–2019 (USD MILLION)

TABLE 192 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.4.8.3 Market estimates and forecasts, by security type, 2014–2025

TABLE 193 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 194 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.4.8.4 Market estimates and forecasts, by operation, 2014–2025

TABLE 195 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 196 CHINA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.4.9 INDIA

10.4.9.1 Market estimates and forecasts, by component, 2014–2025

TABLE 197 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 198 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.4.9.2 Market estimates and forecasts, by service, 2014–2025

TABLE 199 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 200 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.4.9.3 Market estimates and forecasts, by security type, 2014–2025

TABLE 201 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 202 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.4.9.4 Market estimates and forecasts, by operation, 2014–2025

TABLE 203 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 204 INDIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.4.10 REST OF ASIA PACIFIC

10.4.10.1 Market estimates and forecasts, by component, 2014–2025

TABLE 205 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 206 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE

MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)**10.4.10.2 Market estimates and forecasts, by service, 2014–2025****TABLE 207 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)****TABLE 208 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)****10.4.10.3 Market estimates and forecasts, by security type, 2014–2025****TABLE 209 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)****TABLE 210 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)****10.4.10.4 Market estimates and forecasts, by operation, 2014–2025****TABLE 211 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)****TABLE 212 REST OF ASIA PACIFIC: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)****10.5 MIDDLE EAST AND AFRICA****10.5.1 MIDDLE EAST AND AFRICA: COVID-19 IMPACT****10.5.2 MIDDLE EAST AND AFRICA: MARKET DRIVERS****10.5.3 MIDDLE EAST AND AFRICA: REGULATIONS****10.5.4 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025****TABLE 213 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)****TABLE 214 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)****10.5.5 MARKET ESTIMATES AND FORECASTS, BY SERVICE, 2014–2025****TABLE 215 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)****TABLE 216 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)****10.5.6 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025****TABLE 217 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)****TABLE 218 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)****10.5.7 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025****TABLE 219 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE
MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)****TABLE 220 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE**

MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)**10.5.8 MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025****TABLE 221 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)****TABLE 222 MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)****10.5.9 KINGDOM OF SAUDI ARABIA****10.5.9.1 Market estimates and forecasts, by component, 2014–2025****TABLE 223 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)****TABLE 224 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)****10.5.9.2 Market estimates and forecasts, by service, 2014–2025****TABLE 225 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)****TABLE 226 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)****10.5.9.3 Market estimates and forecasts, by security type, 2014–2025****TABLE 227 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)****TABLE 228 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)****10.5.9.4 Market estimates and forecasts, by operation, 2014–2025****TABLE 229 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)****TABLE 230 KINGDOM OF SAUDI ARABIA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)****10.5.10 KUWAIT****10.5.10.1 Market estimates and forecasts, by component, 2014–2025****TABLE 231 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)****TABLE 232 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)****10.5.10.2 Market estimates and forecasts, by service, 2014–2025****TABLE 233 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, 2014–2019 (USD MILLION)****TABLE 234 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)****10.5.10.3 Market estimates and forecasts, by security type, 2014–2025**

TABLE 235 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, SECURITY TYPE 2014–2019 (USD MILLION)

TABLE 236 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.5.10.4 Market estimates and forecasts, by operation, 2014–2025

TABLE 237 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 238 KUWAIT: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.5.11 REST OF MIDDLE EAST AND AFRICA

10.5.11.1 Market estimates and forecasts, by component, 2014–2025

TABLE 239 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 240 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.5.11.2 Market estimates and forecasts, by service, 2014–2025

TABLE 241 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 242 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.5.11.3 Market estimates and forecasts, by security type, 2014–2025

TABLE 243 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 244 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.5.11.4 Market estimates and forecasts, by operation, 2014–2025

TABLE 245 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 246 REST OF MIDDLE EAST AND AFRICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.6 LATIN AMERICA

10.6.1 LATIN AMERICA: COVID-19 IMPACT

10.6.2 LATIN AMERICA: MARKET DRIVERS

10.6.3 LATIN AMERICA: REGULATIONS

10.6.4 MARKET ESTIMATES AND FORECASTS, BY COMPONENT, 2014–2025

TABLE 247 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2014–2019 (USD MILLION)

TABLE 248 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COMPONENT, 2019–2025 (USD MILLION)

10.6.5 MARKET ESTIMATES AND FORECASTS, BY SERVICE, 2014–2025
TABLE 249 OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2014–2019 (USD MILLION)

TABLE 250 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SERVICE, 2019–2025 (USD MILLION)

10.6.6 MARKET ESTIMATES AND FORECASTS, BY SECURITY TYPE, 2014–2025
TABLE 251 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2014–2019 (USD MILLION)

TABLE 252 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY SECURITY TYPE, 2019–2025 (USD MILLION)

10.6.7 MARKET ESTIMATES AND FORECASTS, BY OPERATION, 2014–2025
TABLE 253 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2014–2019 (USD MILLION)

TABLE 254 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY OPERATION, 2019–2025 (USD MILLION)

10.6.8 MARKET ESTIMATES AND FORECASTS, BY COUNTRY, 2014–2025
TABLE 255 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2014–2019 (USD MILLION)

TABLE 256 LATIN AMERICA: OIL AND GAS SECURITY AND SERVICE MARKET SIZE, BY COUNTRY, 2019–2025 (USD MILLION)

10.6.9 BRAZIL

10.6.10 MEXICO

10.6.11 REST OF LATIN AMERICA

11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION

FIGURE 27 KEY DEVELOPMENTS IN OIL AND GAS SECURITY AND SERVICE MARKET DURING 2017–2020

11.1.1 NEW SOLUTION LAUNCHES/SOLUTION ENHANCEMENTS
TABLE 257 NEW SOLUTION LAUNCHES/SOLUTION ENHANCEMENTS, 2019–2020

11.1.2 PARTNERSHIPS
TABLE 258 PARTNERSHIPS, 2018–2020

11.1.3 ACQUISITIONS
TABLE 259 ACQUISITIONS, 2017–2020

11.2 COMPANY EVALUATION MATRIX

11.2.1 STAR

11.2.2 EMERGING LEADER

11.2.3 PERVASIVE

FIGURE 28 OIL AND GAS SECURITY AND SERVICE (GLOBAL) MARKET,
COMPANY EVALUATION MATRIX, 2020

11.3 START-UP QUADRANT

11.3.1 PROGRESSIVE COMPANIES

11.3.2 STARTING BLOCKS

11.3.3 RESPONSIVE COMPANIES

11.3.4 DYNAMIC COMPANIES

FIGURE 29 OIL AND GAS SECURITY AND SERVICE (GLOBAL) MARKET, START-
UP/SME EVALUATION MATRIX, 2020

11.4 MARKET SHARE, 2020

FIGURE 30 MARKET SHARE OF KEY PLAYERS IN OIL AND GAS SECURITY
AND SERVICE MARKET, 2020

12 COMPANY PROFILES

12.1 INTRODUCTION

FIGURE 31 GEOGRAPHIC REVENUE MIX OF MARKET PLAYERS, 2019
(Business overview, Products/Solutions/Services offered, Recent developments,
COVID-19-related strategies & MnM View)*

12.2 CISCO

FIGURE 32 CISCO: COMPANY SNAPSHOT

FIGURE 33 CISCO: SWOT ANALYSIS

12.3 HONEYWELL

FIGURE 34 HONEYWELL: COMPANY SNAPSHOT

FIGURE 35 HONEYWELL: SWOT ANALYSIS

12.4 SIEMENS

FIGURE 36 SIEMENS: COMPANY SNAPSHOT

FIGURE 37 SIEMENS: SWOT ANALYSIS

12.5 MICROSOFT

FIGURE 38 MICROSOFT: COMPANY SNAPSHOT

FIGURE 39 MICROSOFT: SWOT ANALYSIS

12.6 NORTONLIFELOCK

FIGURE 40 NORTONLIFELOCK: COMPANY SNAPSHOT

FIGURE 41 NORTONLIFELOCK: SWOT ANALYSIS

12.7 LOCKHEED MARTIN

FIGURE 42 LOCKHEED MARTIN: COMPANY SNAPSHOT

12.8 WATERFALL SECURITY SOLUTIONS

12.9 ABB

FIGURE 43 ABB: COMPANY SNAPSHOT

12.10 PARSONS

FIGURE 44 PARSONS: COMPANY SNAPSHOT

12.11 FORTINET

FIGURE 45 FORTINET: COMPANY SNAPSHOT

12.12 TREND MICRO

FIGURE 46 TREND MICRO: COMPANY SNAPSHOT

12.13 SOPHOS

FIGURE 47 SOPHOS: COMPANY SNAPSHOT

12.14 FORESCOUT

12.15 GE

12.16 NOZOMI NETWORKS

12.17 CNL SOFTWARE

12.18 MOXA

12.19 SYNECTICS

12.20 INTEL

12.21 SPEEDCAST

12.22 GPS SECURITY

12.23 ATHOS

12.24 TSN

12.25 J&G SECURITY

12.26 BOOZ ALLEN

12.27 THALES

12.28 HCL

12.29 IBM

12.30 BAE SYSTEMS

12.31 XAGE SECURITY

12.32 RIGHT TO WIN

*Details on Business overview, Products/Solutions/Services offered, Recent developments, COVID-19-related strategies & MnM View might not be captured in case of unlisted companies.

13 ADJACENT MARKETS

13.1 INTRODUCTION

TABLE 260 ADJACENT MARKETS AND FORECASTS

13.2 LIMITATIONS

13.3 OIL AND GAS SECURITY AND SERVICE ECOSYSTEM AND ADJACENT MARKETS

13.4 OIL AND GAS SECURITY AND SERVICE ADJACENT MARKET – OIL AND GAS

CLOUD APPLICATIONS MARKET

TABLE 261 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY REGION, 2018–2024 (USD MILLION)

TABLE 262 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY COMPONENT, 2018–2024 (USD MILLION)

TABLE 263 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY SOLUTION, 2018–2024 (USD MILLION)

TABLE 264 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY SERVICES, 2018–2024 (USD MILLION)

TABLE 265 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY OPERATION, 2018–2024 (USD MILLION)

TABLE 266 OIL AND GAS CLOUD APPLICATIONS MARKET SIZE, BY DEPLOYMENT TYPE, 2018–2024 (USD MILLION)

13.5 OIL AND GAS SECURITY AND SERVICE ADJACENT MARKET – PERIMETER INTRUSION AND DETECTION SYSTEM MARKET

TABLE 267 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY REGION, 2017–2023 (USD MILLION)

TABLE 268 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY COMPONENT, 2017–2023 (USD MILLION)

TABLE 269 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY SOLUTIONS, 2017–2023 (USD MILLION)

TABLE 270 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY SERVICES, 2017–2023 (USD MILLION)

TABLE 271 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY DEPLOYMENT TYPE, 2017–2023 (USD MILLION)

TABLE 272 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY ORGANIZATION SIZE, 2017–2023 (USD MILLION)

TABLE 273 PERIMETER INTRUSION AND DETECTION SYSTEM MARKET SIZE, BY VERTICAL, 2017–2023 (USD MILLION)

13.6 OIL AND GAS SECURITY AND SERVICE ADJACENT MARKET – MASS NOTIFICATION SYSTEMS MARKET

TABLE 274 MASS NOTIFICATION SYSTEMS MARKET SIZE, BY REGION, 2018–2024 (USD MILLION)

TABLE 275 MASS NOTIFICATION SYSTEMS MARKET SIZE, BY COMPONENT, 2018–2024 (USD MILLION)

TABLE 276 MASS NOTIFICATION SYSTEMS MARKET SIZE, BY SOLUTION, 2018–2024 (USD MILLION)

TABLE 277 MASS NOTIFICATION SYSTEMS MARKET SIZE, BY VERTICAL, 2018–2024 (USD MILLION)

13.7 OIL AND GAS SECURITY AND SERVICE ADJACENT MARKET – INDUSTRIAL CONTROL SYSTEMS MARKET

TABLE 278 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY REGION, 2016–2022 (USD MILLION)

TABLE 279 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY COMPONENT, 2016–2022 (USD MILLION)

TABLE 280 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY SOLUTIONS, 2016–2022 (USD MILLION)

TABLE 281 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY SERVICE, 2016–2022 (USD MILLION)

TABLE 282 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY SECURITY TYPE, 2016–2022 (USD MILLION)

TABLE 283 INDUSTRIAL CONTROL SYSTEMS MARKET SIZE, BY VERTICALS, 2016–2022 (USD MILLION)

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 AVAILABLE CUSTOMIZATIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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